



INDITION COMMERCE

Special Orders Setup Guide

Enable the module, configure policy, and verify a complete order

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Prepared by Indition product documentation for site administrators and deployment staff. This document describes the supported workflow in Special Orders 1.1 with review corrections. Use the sections below to find the policy, procedure, or implementation detail relevant to your task.

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Before enabling the feature

Deploy the coordinated components listed in the Release Notes. Shop, Order, and Customer are required dependencies. POS and POSFront provide register entry and payment collection; enabled Inventory provides purchasing, warehouse reservations, and serialized fulfillment.

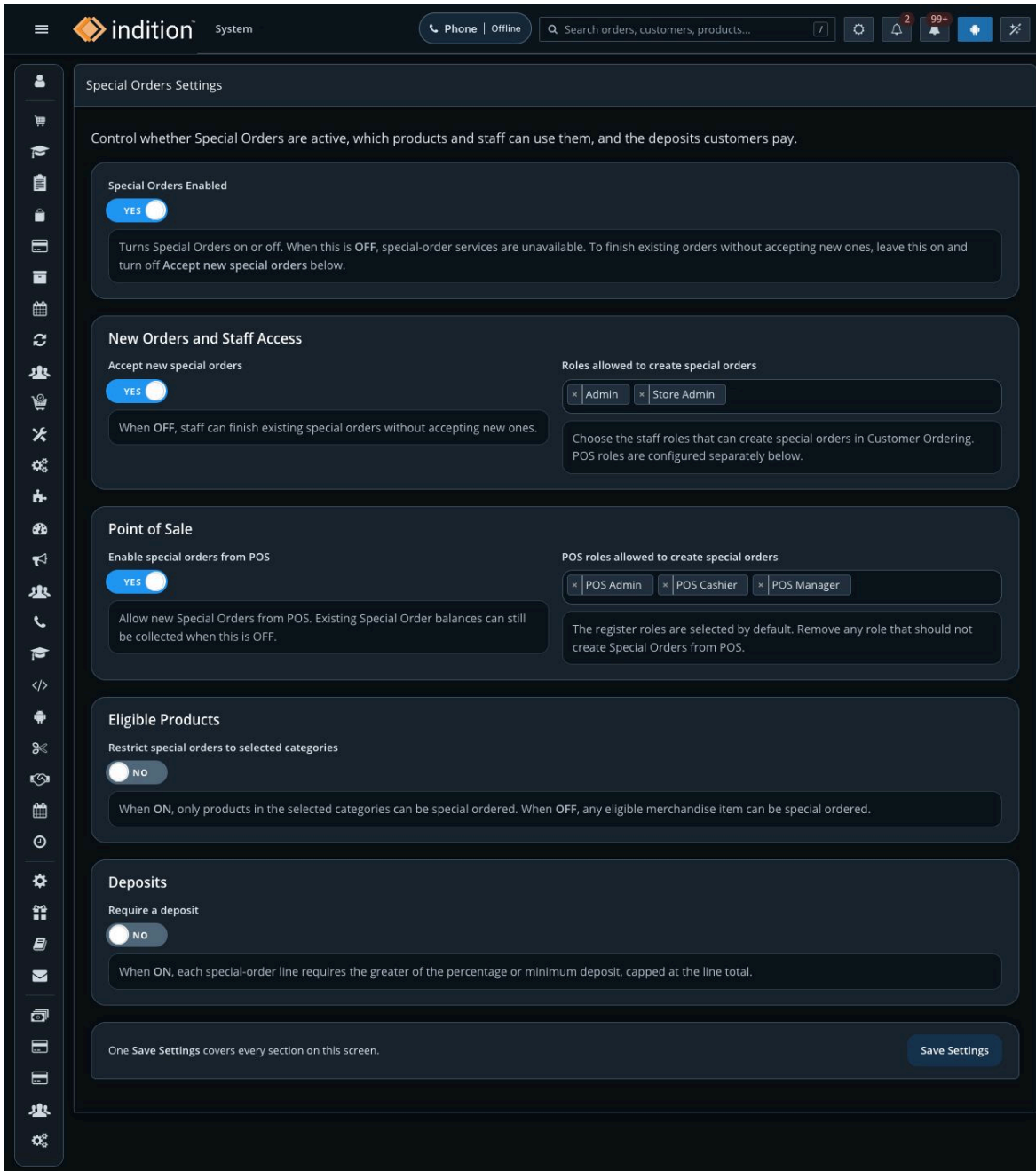
Apply the SpecialOrders package 1.1 migrations and the POSFront package 1.9 route patch through the normal module installation or patch tools. Keep existing patch identifiers intact. New installations seed Special Orders OFF; existing setting values are preserved by the idempotent patches.

Use the site's normal permission management to grant the appropriate Special Orders settings, management, and customer-block routes. The roles allowed to create Special Orders are an additional creation policy; they do not replace backend route grants.

Enable the module and choose creation roles

Open Special Orders Settings. Set Special Orders Enabled to YES, leave Accept new special orders at YES, and review Roles allowed to create special orders. Review the default selected staff roles and remove any that should not create future-delivery items. When POS is installed and enabled, a separate Enable special orders from POS switch and register-role selection appear.

Full platform access is implicit and is not shown as a selectable role. If the configurable list is empty, ordinary staff cannot create Special Orders. Click the single Save Settings button; it covers every section.



Special Orders Settings on dev. Module and intake switches are separate; the Customer Ordering and POS creation roles are configured separately.

Limit eligible merchandise

Leave Restrict special orders to selected categories at NO to allow eligible merchandise across categories. Set it to YES to display the searchable checkbox selector. Search for categories, use Select All or Clear All when appropriate, and review every selected category in the list beneath the control.

Selected parent categories include child categories. At least one eligible category is required when restrictions and acceptance of new orders are both enabled. Gift cards and payment-only lines are not merchandise eligible for this workflow.

Set the minimum deposit

Set Require a deposit to YES to expose Deposit percentage and Minimum deposit per item line. The minimum is calculated separately for each future-delivery line after discounts, before tax and shipping.

The rule is $\text{minimum deposit} = \min(\text{line merchandise total}, \max(\text{percentage amount}, \text{floor}))$. A cashier can choose a higher deposit, up to the line total. With the deposit requirement OFF, zero is allowed.

Line total	Percentage	Floor	Required deposit
\$300.00	25%	\$50.00	\$75.00
\$100.00	25%	\$50.00	\$50.00
\$40.00	25%	\$50.00	\$40.00

Tax and other current charges are not deferred by this merchandise-deposit rule.

Prepare Inventory and purchasing

Enable Inventory and confirm the intended warehouses and locations are active. Check available quantities and serialization settings for the SKUs to be used. A serialized item will need one in-stock serial per assigned unit at the selected location.

Confirm that purchasing staff can use vendors, the target warehouse, and the existing Inventory Purchase Order workflow. Generating a draft does not approve, send, or receive a PO. Staff must still receive purchased goods and explicitly assign them to the Special Order.

Set customer restriction responsibilities

Decide which staff may manage customer blocks through route permissions. On a customer account, open Actions and choose Special Order Blacklist. An internal note is required. If Show internal note to cashier is NO, a separate Cashier note is also required.

The optional Customer note is stored separately and is not sent when saved. An automatic removal date must be a future date. The block ends at the start of that date; with no date it continues until an authorized staff member removes it. The block affects new Special Orders only.

Run an acceptance test

1. Use a designated test customer and refresh POS to load the deployed assets.
2. Add regular merchandise and at least one Special Order; include the same SKU in both forms to confirm separate lines.
3. Set a delivery date, deposit, and PO reference. Confirm the amount due today includes the regular goods, deposits, and current tax or charges.
4. Complete the test sale using the site's approved development payment procedure. Confirm the Special Orders report shows each future item and no stock was taken for it at sale time.

5. Generate a draft PO for uncovered units or assign existing stock. Confirm that assignment increases reserved quantity without deducting on hand.
6. Collect the outstanding balance through the customer's Special Orders list in POS. For tracked goods, record handover only after stock has been assigned.
7. Verify that handover reduces on hand and releases the reservation for the handed-over quantity.
8. Test a customer block with a private internal note. Confirm that POS displays only the cashier wording, creator, creation time, and optional end date.

Use disposable test records and restore any test settings and inventory through the site's approved cleanup process.

Pause new orders without stopping fulfillment

Keep Special Orders Enabled at YES and change Accept new special orders to NO. Existing recorded orders can still be paid, sourced, assigned, and handed over. Unplaced carts and held sales are still new bookings when they are checked out.

Setting the module itself to OFF stops its operational services as well as new bookings. Settings remains the place to turn it back on. Do not uninstall a module containing Special Order history.

Development entry points

The following links are for the development site and require a normal authorized sign-in. Other environments use the same routes on their own host.

- [Special Orders Settings](#)
- [Special Orders Report](#)
- [POS](#)
- [Customer Ordering](#)

The report may be empty after test cleanup. Create a new test order rather than looking for deleted QA records.